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| 10/722,118 | 11/24/2003 | Hugh Molotsi | 37202/127002; 990050 | 4835 |
| 57956 7590 05/13/2008 OSHA - LIANG L.L.P. (INTUIT) 1221 MCKINNEY STREET SUITE 2800 HOUSTON, TX 77010 | | | | |
| EXAMINER CAMPEN, KELLY SCAGGS | | | | |
| ART UNIT | | PAPER NUMBER | | |
| 3691 | | | | |
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| 05/13/2008 | | ELECTRONIC | | |

Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Notice of the Office communication was sent electronically on above-indicated "Notification Date" to the following e-mail address(es):

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Office Action Summary

Application No.

10/722,118

Applicant(s)

MOLOTSI ET AL.

Examiner

Kelly Campen

Art Unit

3691

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --
Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

- 1) ☒ Responsive to communication(s) filed on 27 March 2008.
- 2a) ☐ This action is **FINAL**. 2b) ☒ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

- 4) ☒ Claim(s) 1-10, 15, 16 and 18 is/are pending in the application.
- 4a) Of the above claim(s) _____ is/are withdrawn from consideration.
- 5) ☐ Claim(s) _____ is/are allowed.
- 6) ☒ Claim(s) 1-10, 15, 16 and 18 is/are rejected.
- 7) ☐ Claim(s) _____ is/are objected to.
- 8) ☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

- 9) ☒ The specification is objected to by the Examiner.
- 10) ☐ The drawing(s) filed on _____ is/are: a) ☐ accepted or b) ☐ objected to by the Examiner.
- Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).
- Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All b) ☐ Some * c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
 2. ☐ Certified copies of the priority documents have been received in Application No. _____.
 3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

- 1) ☒ Notice of References Cited (PTO-892)
- 2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)
- 3) ☐ Information Disclosure Statement(s) (PTO/SI-108)
- 4) ☐ Interview Summary (PTO-413)
- 5) ☐ Notice of Informal Patent Application
- 6) ☐ Other: _____
- Paper No(s)/Mail Date _____

DETAILED ACTION

Election/Restrictions

Applicant's election without traverse of Group I, claims 1-10, 15-16 and 18 in the reply filed on 3/27/2008 is acknowledged.

Applicant is reminded that upon the cancellation of claims to a non-elected invention, the inventorship must be amended in compliance with 37 CFR 1.48(b) if one or more of the currently named inventors is no longer an inventor of at least one claim remaining in the application. Any amendment of inventorship must be accompanied by a request under 37 CFR 1.48(b) and by the fee required under 37 CFR 1.17(i).

Claim Rejections - 35 USC § 102

The following is a quotation of the appropriate paragraphs of 35 U.S.C. 102 that form the basis for the rejections under this section made in this Office action:

A person shall be entitled to a patent unless –

(b) the invention was patented or described in a printed publication in this or a foreign country or in public use or on sale in this country, more than one year prior to the date of application for patent in the United States.

Claims 1-10, 15-16 and 18 are rejected under 35 U.S.C. 102(b) as being anticipated by Shutes (US 2001/0044781 A1).

Specifically as to claims 1, 16 and 18, Shutes discloses a computer-implemented method, system and associated computer readable medium for creating reports from financial data in a financial software application, the method comprising: receiving a selection of a template to be used to create a report, the template including layout information and content field information;

receiving financial data from a data source; and applying the received layout information and received content field information to the received financial data to generate a report, the report having a layout specified by the layout information, and including content associated with the content field information (see abstract, paragraph 0050, 0118, 0060, 0062, 0065, 0138, 0143, 0169, 0217, 0243, 0248-0249, -272, 0294, 0301, 0303-4, 0307, 0317, 0319, 0332, 0354, 0355, 0401-424).

Specifically as to claim 2, outputting the report to an output device (see above rejections for claims 1, 16 and 18, in addition figure 41 J).

Specifically as to claim 3, the output device is a computer monitor (see above rejections for claims 1, 16 and 18, in addition figure 41 J).

Specifically as to claim 4, the output device is a printer (see above rejections for claims 1, 16 and 18, in addition paragraph 0403).

Specifically as to claim 5, the output device is storage medium (see above rejections for claims 1, 16 and 18, in addition paragraph 0445).

Specifically as to claim 6, data source is a storage device (see above rejections for claims 1, 16 and 18, in addition paragraph 0445).

Specifically as to claim 7, template is selected using the Internet (see above rejections for claims 1, 16 and 18, in addition paragraph 0445).

Specifically as to claim 8, storing the selected template locally (see above rejections for claims 1, 16 and 18, in addition paragraph 0433, 0060, 0134).

Specifically as to claim 9, the selected template includes version information, and prior to applying the received layout information and received content field information to the received

financial data, the template version is compared to a version associated with the received financial data to determine whether the financial data is compatible with the selected template (see above rejections for claims 1, 16 and 18, in addition, inherently one would check to see if the version of one would be compatible to open the files of another, paragraph 0467, 0411).

Specifically as to claim 10, responsive to a determination that the financial data is compatible with the selected template, generating the report (see above rejections for claims 1, 9, 16 and 18, in addition paragraphs 0069-0070, figure 14, step 28, paragraph 0248, 301, 307, 372, 410, 443) .

Specifically as to claim 15, Shutes discloses a system for creating reports from financial data in a financial software application, the system comprising: a template data store for storing report templates, the report templates including layout information and content field information used to generate a report; a user data store for storing user financial data; and a report engine, communicatively coupled to the template data store and the user data store, for receiving template data from the template data store and user data from the user data store, and for generating reports by applying the template data to the user data (see abstract, paragraph 0050, 0118, 0060, 0062, 0065, 0138, 0143, 0169, 0217, 0243, 0248-0249, -272, 0294, 0301, 0303-4, 0307, 0317, 0319, 0332, 0354, 0355, 0401-424, figure 14 as well as the above citation for the above rejections).

Examiner's Note

Examiner has cited particular columns and line numbers in the references as applied to the claims below for the convenience of the applicant. Although the specified citations are

representative of the teachings in the art and are applied to the specific limitations within the individual claim, other passages and figures may apply as well. It is respectfully requested from the applicant, in preparing the responses, to fully consider the references in entirety as potentially teaching all or part of the claimed invention, as well as the context of the passage as taught by the prior art or disclosed by the examiner.

Conclusion

The prior art made of record and not relied upon is considered pertinent to applicant's disclosure. Bevin et al. disclose a non-OCR method for capture of computer filled in forms. Brunsting et al. disclose a method for secure vendor access to accounts payable information over the internet. Mizuma et al. disclose a method for monitoring and managing the educational progress of students. Brady et al. disclose a system for a planner. Innes et al. disclose a method for developing a statement of work. Lawrence discloses systems for managing risk associated with a geo-political area.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Kelly Campen whose telephone number is (571)272-6740. The examiner can normally be reached on Monday-Thursday.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Alexander Kalinowski can be reached on (571) 272-6771. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/Kelly Campen/
Examiner, Art Unit 3691